

## RFQF Buyer's Guide

The purpose of the RFQF (Request for Quotes-Formal) is to advertise the competitive procurement for solicitation of formal quotes from potential bidders to participate in the Reverse Auction. Buyers will be responsible for defining product categories, adding bidders, and publishing all bid related documents to the procurement portal. Once the responses have been received and the Opening Date has been reached, buyers will review the submissions to qualify bidders and determine a starting price for reverse auction items.

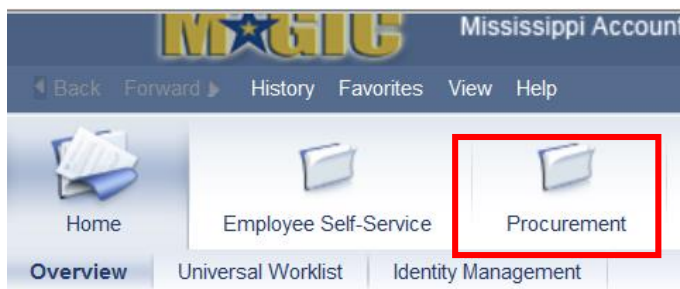
### Select RFX Type

- a) Using your User-ID and Password, log into MAGIC:

<https://portal.magic.ms.gov>

The image shows the login page for the MAGIC (Mississippi Accountability System for Government Information and Collaboration) portal. The page features the MAGIC logo on the left, which includes a map of Mississippi and the text "MAGIC" in large, bold letters. To the right of the logo, there is a login form with two input fields: "User" and "Password", both marked with a red asterisk. Below these fields is a "Log On" button. Above the password field, there is a link for users having password problems. At the bottom left, there is a brief description of MAGIC and a link to the website for more information.

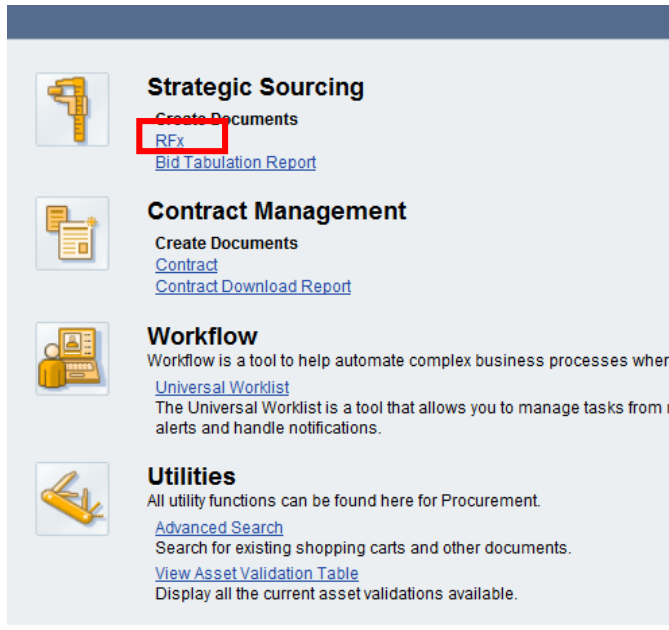
- b) Select **Procurement** icon from the home page options.



- c) Select **Procurement Work Center**



d) Select the Create RFx under to Strategic Sourcing



e) Select Bid Type (RFQF) > Continue

**Select RFx Type**

Select the type of RFx you want to create

RFx Type	RFx Type Description
NBID	Negotiated Bid
OVAR	Oversight Appv Reqst
OVEX	Oversight Exempt
PREQ	Procurement Request
RFIN	Req. for Information
RFPR	Request for Proposal
RFQF	RFQ - Formal
RFQI	RFQ - Informal

Enter External Number

## RFx Information Entry

In the RFx Parameters tab, enter the following data elements:

- Start Date (First date/time of advertisement)
- Bidder Submission Deadline (Latest date/time quotes must be submitted to the agency)
- Opening Date (Earliest date/time bid responses can be opened by the buyer; cannot be prior to 8th working day after last advertisement date)
- Surrogate Bid Entry Deadline (Defaults (7) workings days from the submission deadline)

Number 3140000941		Smart Number 1130-18-R-RFQF-00007		Type RFQ - Formal	Status Saved	Created On 09/26/2017 10:07:33	Created By 1130_SRGBOS1	Number c
<b>RFx Information</b>   Bidders   Items   Notes and Attachments   Conditions   Weights and Scores   Approval   Tracking								
<b>RFx Parameters</b>   Questions   Notes and Attachments   Conditions   Table Extension   Synopsis   User-Specified Status								
<b>Identification</b> Smart Number: 1130-18-R-RFQF-00007 <input type="checkbox"/> Smart Number is External RFx Number: 3140000941 Type: RFQ - Formal Product Category: Publication Type: Public RFx				<b>Event Parameters</b> Currency: USD Target Value: 0.00 USD Detailed Price Information: Price with Conditions Follow-On Document: Contract Bidder Can Change RFx Responses: <input checked="" type="checkbox"/> Allow Multiple RFx Responses for Each Company: <input checked="" type="checkbox"/> Display Weighting to Bidders: <input type="checkbox"/> * Major Procurement Category: COMMODITIES * Sub Procurement Category: SUPPLIES - NON-TECHNOLOGY				
<b>Organization</b> Purchasing Organization: State of Mississippi - Purchasing Purchasing Group: 1130 GEN PURCH <a href="#">Show Members</a>								
<b>Dates</b> Start Date: 09/27/2017 08:00:00 AM * Surrogate Bid entry Deadline: 10/20/2017 05:00:00 PM * Opening Date: 10/20/2017 02:00:00 PM				* Bidder Submission Deadline: 10/11/2017 05:00:00 PM Electronic Responses Only: <input checked="" type="checkbox"/> Document Builder Doc Type: ZRFX_AMEND Confidential Document: <input type="checkbox"/>				

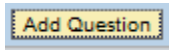
- Major Procurement Category – COMMODITIES
- Sub Procurement Category - SUPPLIES/EQUIPMENT –NON TECHNOLOGY

* Major Procurement Category:	COMMODITIES
* Sub Procurement Category:	SUPPLIES - NON-TECHNOLOGY

## Add Questions for vendors (optional)

The screenshot shows the 'RFX Information' tab selected. Below it, the 'Questions' sub-tab is highlighted. At the bottom, there are three buttons: 'Details', 'Add Question', and 'Delete'.

- a) To add questions click the sub tab “Questions” by RFX Parameters and then click the button

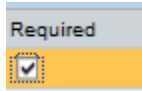


and search for appropriate applicable questions relevant to RFX.

- b) To do an open search, click the **Search** button to bring up all questions to be selected and scroll down the preferred question to be inserted by highlighting the question and clicking on the



button.

- c) These questions can also be marked as required  which will mean that these will require answers prior to the response being accepted in the system.

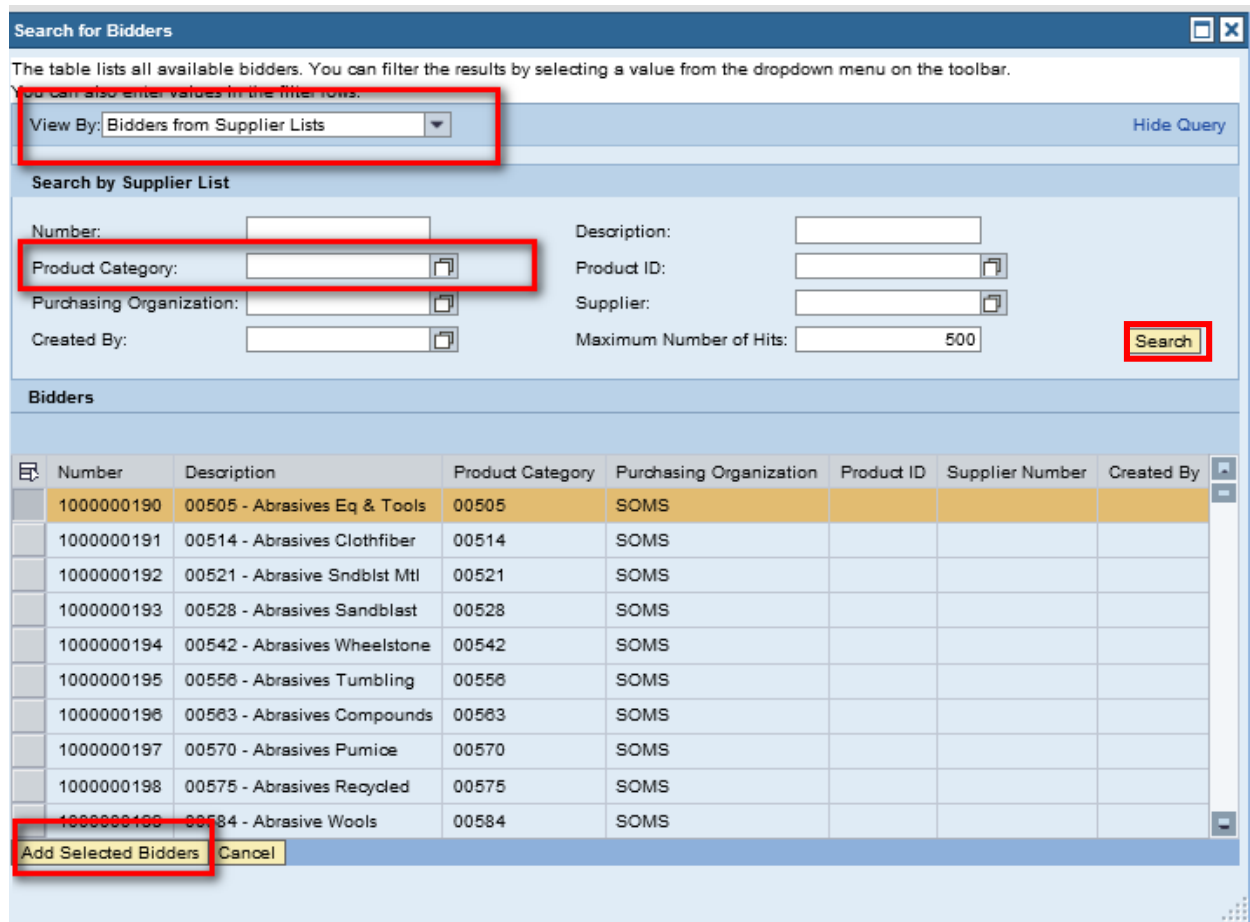
Additionally these will print on the RFX output form.

Sample questions:

Number	3140000941	Smart Number	1130-18-R-RFQF-00007	Type	RFQ - Formal	Status	Saved	Created On	09/26/2017 10:07:33	Created By	1130_SRGBOS1	Number of Bidders	263
<div> RFX Information Bidders Items Notes and Attachments Conditions Weights and Scores Approval Tracking </div>													
<div> RFX Parameters Questions Notes and Attachments Conditions Table Extension Synopsis User-Specified Status </div>													
<div> Details Add Question Delete </div>													
Field Name	Question					Type	Unit	Currency	To Be Weighted	Required			
OPTFM_TRANS_PMT_TERMS	Confirm applicable transportation and payment terms are enclosed/attached					Yes / No field			<input type="checkbox"/>	<input checked="" type="checkbox"/>			
OPTFM_COMPANY_BUSINESS	How long has your company been in business (Specify in years)					Quantity	YR		<input type="checkbox"/>	<input checked="" type="checkbox"/>			
OPTFM_EMAIL	Please provide an email address?					Text (Max. 130 Characters)			<input type="checkbox"/>	<input checked="" type="checkbox"/>			
OPTFM_IND_PROP_FORMAT	Confirm the proposal format and guidelines have been read and understood					Yes / No field			<input type="checkbox"/>	<input checked="" type="checkbox"/>			
OPTFM_PROPOSAL_LETTER	Confirm a signed proposal letter with all pertinent information is enclosed/attached					Yes / No field			<input type="checkbox"/>	<input checked="" type="checkbox"/>			
OPTFM_REG_MS_OFFICE	Is your company registered to do business with the Mississippi Secretary of State's Office					Yes / No field			<input type="checkbox"/>	<input checked="" type="checkbox"/>			
OPTFM_SUSP_DEBAR	Do you have suspensions or debarments against your company. Please specify in the comments section					Yes / No field			<input type="checkbox"/>	<input checked="" type="checkbox"/>			
REV_AUC_TECH_REQ	Confirm the technical requirements have been read.					Yes / No field			<input type="checkbox"/>	<input checked="" type="checkbox"/>			

## Add Bidders to the RFx

- a) Click on the **'Bidders'** tab. Search for appropriate bidders that you want to add to this RFx by clicking on Bidders tab  and then click on  and then select "From Internal Directory" which appears in the dropdown.



The table lists all available bidders. You can filter the results by selecting a value from the dropdown menu on the toolbar. You can also enter values in the filter rows.

View By: Bidders from Supplier Lists

Search by Supplier List

Number:  Description:

Product Category:  Product ID:

Purchasing Organization:  Supplier:


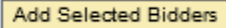
Created By:  Maximum Number of Hits: 500

Search

Bidders

Number	Description	Product Category	Purchasing Organization	Product ID	Supplier Number	Created By
1000000190	00505 - Abrasives Eq & Tools	00505	SOMS			
1000000191	00514 - Abrasives Clothfiber	00514	SOMS			
1000000192	00521 - Abrasive Sndblst Mtl	00521	SOMS			
1000000193	00528 - Abrasives Sandblast	00528	SOMS			
1000000194	00542 - Abrasives Wheelstone	00542	SOMS			
1000000195	00556 - Abrasives Tumbling	00556	SOMS			
1000000196	00563 - Abrasives Compounds	00563	SOMS			
1000000197	00570 - Abrasives Pumice	00570	SOMS			
1000000198	00575 - Abrasives Recycled	00575	SOMS			
1000000199	00584 - Abrasive Wools	00584	SOMS			

Add Selected Bidders Cancel

- Ensure the search view is by "Bidders from Suppliers Lists"
- Enter the product category and click  button.
- Once the bidders have been returned then highlight multiple bidders, if more than one are needed, by using the shift key and left mouse click. Then click the button  to add selected bidders. This will ensure that all the vendors who have registered for a product category will be informed of a bid opportunity.
- Initially at Go-live, bidders will not be associated with supplier list, this type of data is not being converted, and therefore, searching by suppliers list becomes more relevant over time as our data gets more enriched.

These bidders will get notified via email (if an email address is maintained) that a bid opportunity is available.

## Add Items to the RFx

- a) Once you click on the Items tab, ensure that you review the four check box options that control the bids:

Number 3140000941 Smart Number 1130-18-R-RFQF-00007 Type RFQ - Formal Status Saved Created On 09/26/2017 10:07:33

RFX Information Bidders **Items** Notes and Attachments Conditions Weights and Scores Approval Tracking

▼ Item Overview

☒ RFx Response Required for All Items ☐ Bidder Can Add New Items ☒ Allow RFx Response Modification ☐ Bidder Can Change Quantities

- RFx Response Required for All items – uncheck to allow bidders to respond to some line items or check to require all. (must be checked if it's an all or nothing award)
- Bidder Can Add New Items – Allows additional line items (i.e. Alternate/Substitute items) to be proposed by bidder (should not be checked)
- Allow RFx Response Modification – Allows the bidders to make changes to their offers until the submission deadline (this should be checked on)
- Bidder Can Change Quantities – this box will be unchecked and will not apply to Competitive bids. Items will be bid out using a fixed quantity (i.e. quantity of “1”). (should not be checked)

- b) **Line** items will be added using a “Material” as Item Type. Use the **Add Line** button to select “Material” from the drop down.

- c) Buyers must enter item:
- Description
  - Product Category
  - Quantity
  - Unit of Measure

Number 3140000941 Smart Number 1130-18-R-RFQF-00007 Type RFQ - Formal Status Saved Created On 09/26/2017 10:07:33 Created By 1130\_SRMBS01 Number of Bidders 263

RFX Information Bidders **Items** Notes and Attachments Conditions Weights and Scores Approval Tracking

▼ Item Overview

☒ RFx Response Required for All Items ☐ Bidder Can Add New Items ☒ Allow RFx Response Modification ☐ Bidder Can Change Quantities

Details Add Line Add Subline Cut Copy Paste Delete Export

Line Number	Item Type	Option Type	Product ID	Description	Lot	Allow RFx Response Modification	Product Category	Quantity	Unit
1	Material			UNIFORM SHIRTS XL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20070	100 EA	
2	Material			UNIFORM PANTS SZ 36	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20044	100 EA	
3	Material			UNIFORM JACKETS XL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20016	50 EA	
4	Material			UNIFORM BOOTS SZ12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	80086	25 EA	

## Add Notes to the RFx

- a) Add appropriate “Notes and Attachments” at the header level tab. This can be done by clicking on the Notes and Attachments tab and clicking the “Add” button and a dropdown list will appear.

Notes	Text Preview
Header Tendering text	Department of Finance and Administration is issuing an R...
Item Tendering text	DFA is issuing an RFQF to solicit competitive quotes for...
Internal Note	
Synopsis Description	
Additional Contact Info	

- b) The text that should be added is indicated below:

- i) **Header Tendering Text** – This is a detailed description of the RFx, it will not appear on the bid board until the prospective bidders click on the link for bid attachments. It will print on the RFx form under “Notice to Vendor” section of the form. Online bidders will also see this text field.

### SAMPLE TEXT:

Change Header Tendering text

Header Tendering text:

Department of Finance and Administration is issuing an RFQF to solicit competitive quotes from qualified bidders to participate in the Reverse Auction. Quotes will be used to determine a fair and competitive bid starting price. Valid quotes will be accepted until October 11, 2017 at 5 PM CST.

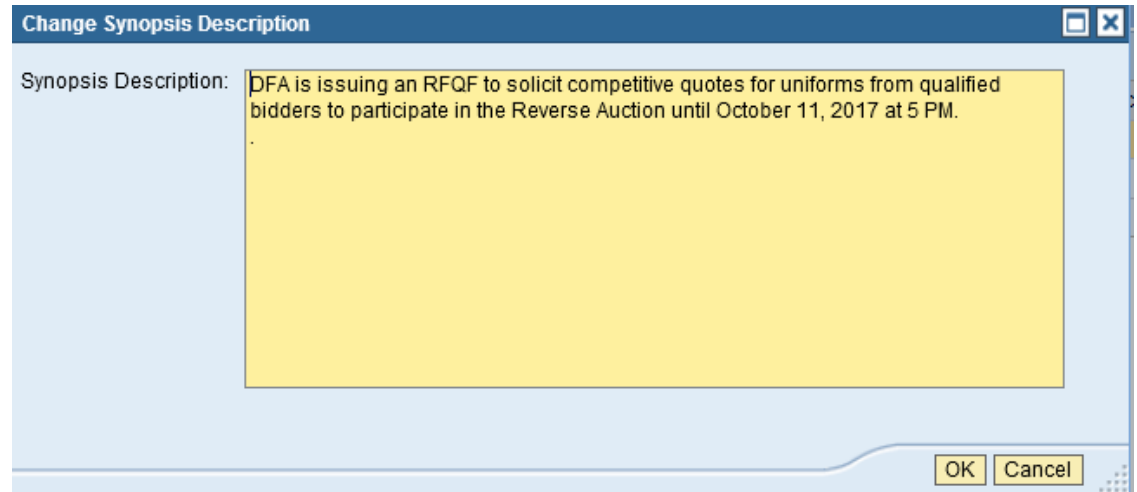
Qualified Bidders will be notified 7 working days prior to the auction via email if selected to participate. Once notification has been received, bidders should logon to MAGIC to validate technical requirements prior to the Live Auction.

The reverse auction will be held on November 1, 2017. It will begin at 8 AM and end at 5 PM CST. All bids must be entered into the eProcurement system during the allotted timeframe to be considered.

OK Cancel

- ii) **Synopsis text** (required) – This should be a short concise description of 80 characters or less that will appear on the bid board and print on the RFx form under “Notice to Vendor” section of the form. Online bidders will also see this text field.

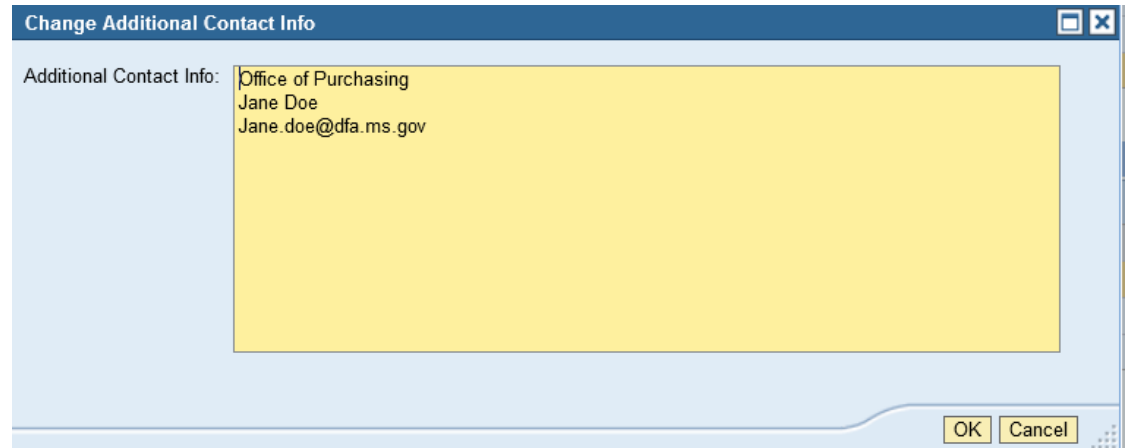
SAMPLE TEXT:



The screenshot shows a dialog box titled "Change Synopsis Description". It has a light blue background and a yellow text area. The text area contains the following text: "DFA is issuing an RFQF to solicit competitive quotes for uniforms from qualified bidders to participate in the Reverse Auction until October 11, 2017 at 5 PM." At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".

- iii) **Additional Contact Info** – This is a more detailed description of contact information, i.e. where and who the RFx questions should be routed to. It will print on the RFx form under “Additional Contact Info” section. Online bidders will also see it as a text field.

SAMPLE TEXT:



The screenshot shows a dialog box titled "Change Additional Contact Info". It has a light blue background and a yellow text area. The text area contains the following text: "Office of Purchasing", "Jane Doe", and "Jane.doe@dfa.ms.gov". At the bottom right of the dialog box, there are two buttons: "OK" and "Cancel".



## Add Attachments to the RFx


- a) Add "Attachments" by click on the **Add Attachment** button.

- b) Note: To have the document visible to the vendor(s); uncheck the box that indicates "Visible Internally Only"

- i) Attachments can be in any file extension. However, its normally best practice that we use common file extension such as pdf, xls, or doc because the prospective bidders may not have the appropriate software for viewing.
- c) The description field is a short description of the attachment; it can be edited by clicking the "Edit Description" button. The description field is displayed on the Bid board.

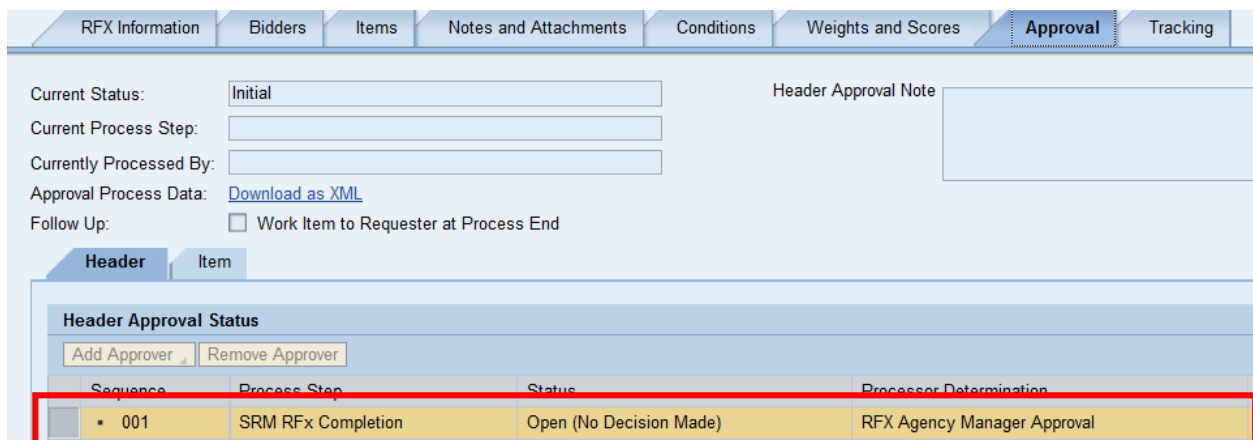
## SAMPLE ATTACHMENTS:

▼ Attachments						
<div> Add Attachment Edit Description Versioning Delete Create Qualification Profile </div>						
Assigned To	Category	Description	Version	Processor	Visible Internally only	
Document Header	Standard Attachment	<a href="#">Instructions to the Bidders</a>	1		<input type="checkbox"/>	
Document Header	Standard Attachment	<a href="#">Proposal Format and Guidelines</a>	1		<input type="checkbox"/>	
Document Header	Standard Attachment	<a href="#">Item Specifications</a>	1		<input type="checkbox"/>	
Document Header	Standard Attachment	<a href="#">Technical Requirements</a>	1		<input type="checkbox"/>	

- d. Publish the RFX by clicking on  button do this after you have confirmed that the bid request has all the relevant information populated and attached. The publish button is only visible in "Edit" mode.

### Approve RFX by going to the Universal Worklist

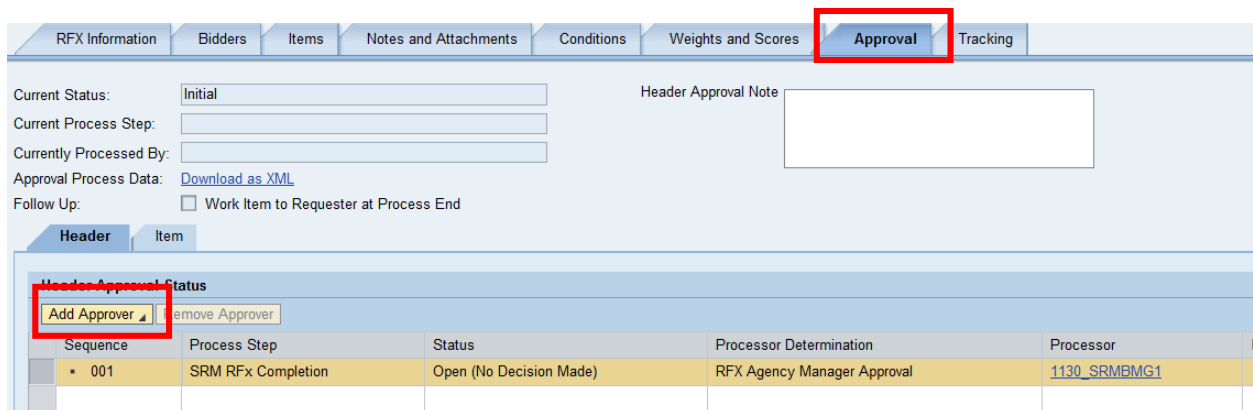
- a) The RFX will only require Agency Manager Approval.



The screenshot shows the 'Approval' tab in the system. The 'Header Approval Status' table is highlighted with a red box. The table has four columns: Sequence, Process Step, Status, and Processor Determination. The first row shows Sequence 001, Process Step SRM RFX Completion, Status Open (No Decision Made), and Processor Determination RFX Agency Manager Approval.

Sequence	Process Step	Status	Processor Determination
001	SRM RFX Completion	Open (No Decision Made)	RFX Agency Manager Approval

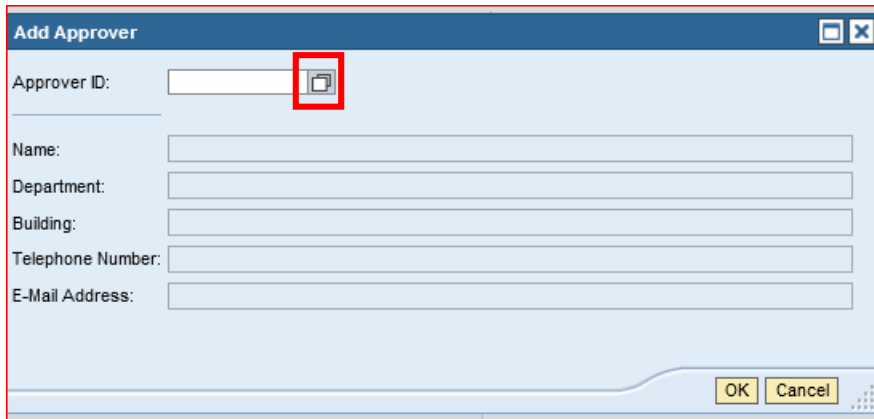
- b) To add an ad hoc approver, go to the Approval tab > Select the Add Approver button



The screenshot shows the 'Approval' tab in the system. The 'Add Approver' button is highlighted with a red box. The 'Header Approval Status' table is also visible, showing the same data as in the previous screenshot.

Sequence	Process Step	Status	Processor Determination	Processor
001	SRM RFX Completion	Open (No Decision Made)	RFX Agency Manager Approval	1130_SRMBMG1

c) A screen will display to enter the Approver id or search by clicking the white search box



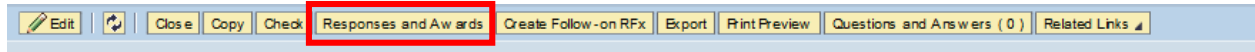
The screenshot shows a software window titled "Add Approver". It features a search bar for "Approver ID:" with a magnifying glass icon to its right, which is highlighted by a red square. Below this are five more text input fields labeled "Name:", "Department:", "Building:", "Telephone Number:", and "E-Mail Address:". At the bottom right of the window are "OK" and "Cancel" buttons.

Once all levels of approval have been processed, the RFx will automatically publish to the State of MS Bid Board on the RFx Start Date and Time.

## Qualifying Bidders to Participate in the Reverse Auction

Once the agency buyer has received the initial quotes, the prequalification of submitted responses shall be performed. Paper bids must be entered into MAGIC on behalf of the supplier as a surrogate bid entry. Only the qualified responses will be “Accepted” within the system. Suppliers who did not qualify should be sent a letter stating reasons of why the initial proposal was rejected.

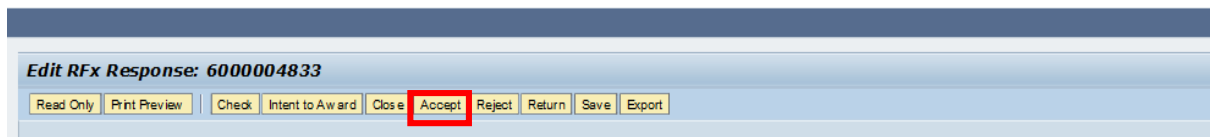
- a) Click “Responses and Awards”



- b) Select the Response Number of the submitted responses to review

Response Activity			
Response Comparison			
Surrogate Bidding			
Details Response On Behalf Return Response Contract Mass Update			
Response Number	Response Status	Company Name	Bidder Name
6000004833	Submitted	AGAIN	FIRST AGAIN LAST AGAIN
		The Bear Company	Bear Grills
		The Care Bears	Care Bear
		The Doobie Brothers	Michael McDonald
6000004834	Submitted	Eagle Scouts	Joe Eagle
		SHARETHA MINUTE MAID	SHARETHA MINUTE MAID
		SHARETHA LIP GLOSS	SHARETHA LIP GLOSS
		The Gremlin Company	Stew Wallace
		SHARETHA LEMONADE	SHARETHA LEMONADE
		The Herringbone Driver	Wyatt Earp
		Ferris Bueller	Ferris Bueller
		RIHANA THE SINGER	RIHANA SINGER
		SOLO DOLO	SOLO DOLO
		PRINTING COPIES	PRINT COPY
		SHARETHA APPRECIATION	SHARE APPREC
		GROOVE THEORY	GROOVE THEORY
		HALLOWEEN MONTH	HALLOWEEN MONTH
		MISSISSIPPI BRAVE	MISS BRAVE

- c) If the buyer determines the supplier qualifies to participate in the auction, click “Accept”.

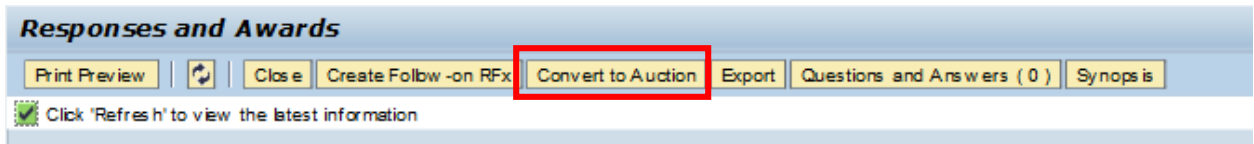


- d) Continue until all suppliers who have met the specifications have been accepted.

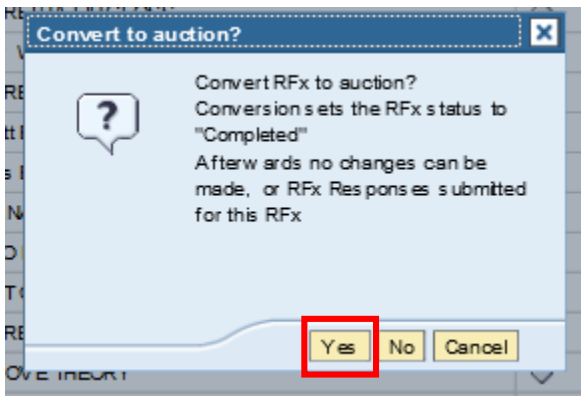
Response Activity			
Response Comparison			
Surrogate Bidding			
Details Response On Behalf Return Response Contract Mass Update			
Response Number	Response Status	Company Name	Bidder Name
6000004833	Accepted	AGAIN	FIRST AGAIN LAST AGAIN
		The Bear Company	Bear Grills
		The Care Bears	Care Bear
		The Doobie Brothers	Michael McDonald
6000004834	Submitted	Eagle Scouts	Joe Eagle

## Convert RFX to Auction

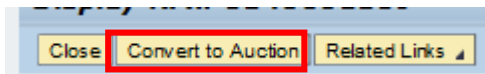
a) Select “Convert to Auction”



b) Click “YES” once the dialogue window appears.



c) Select “Convert to Auction”



d) Secure the auction number and click “OK”

